



ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

**Second Amended Account Current and Report of Conservator; Petition of Conservator
Petition for its Settlement, for Allowance of Attorneys Compensation and for its Termination**

| | | | | |
|---|---------------|--|--|---|
| | | <p>DEBRA PASLEY, Mother and Conservator of the Person and Estate with bond of \$15,000.00, is Petitioner. <i>(Not verified.)</i></p> <p>Account period: 3/28/13 – 10/17/14 Accounting: <u>Not provided</u> Beginning POH: \$13,438.31 Ending POH: \$70,195.61 (\$1,715.61 plus a 1/5 interest in real property in Virginia valued at \$68,480.00)</p> <p>Petitioner states: Inventory and Appraisal was filed 6/5/13 showing the value of the estate to be \$13,438.31. Summary of account and supporting schedules are provided at Exhibit B. <i>(See #1.)</i></p> <p>As reflected in prior pleadings, the Conservator and Conservatee moved out of state. The Conservator was appointed Guardian of the Conservatee in Oklahoma by Court order and Letters issued on 8/13/14.</p> <p>Petitioner does not request compensation for her services.</p> <p>Petitioner requests attorney's compensation as set forth in Exhibit "C." <i>(See #3.)</i></p> <p>Petitioner prays:</p> <ol style="list-style-type: none"> 1. That this account and report be approved and settled; 2. That the acts of the Conservator shown in the account and report be approved; 3. That, upon settlement of this account, the Conservator be directed to pay her attorneys, McCormick Barstow, LLP, compensation for services rendered and, as yet, unpaid; 4. That the Conservatorship in California be terminated; and 5. That the Court grant such other and further relief as it deems just and proper. | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order 5/17/16: Counsel represents that they have re-established contact with their client; requests 60 days.</p> <p>As of 7/20/16, nothing further has been filed. The following issues remain noted:</p> <p align="center"><u>SEE PAGE 2</u></p> | |
| Cont. from 042315, 060215, 081815, 091515, 102015, 120115, 010516, 020916, 051716 | | | | |
| <input type="checkbox"/> | Aff.Sub.Wit. | | | |
| <input type="checkbox"/> | Verified | | | x |
| <input checked="" type="checkbox"/> | Inventory | | | |
| <input type="checkbox"/> | PTC | | | |
| <input type="checkbox"/> | Not.Cred. | | | |
| <input type="checkbox"/> | Notice of Hrg | | | x |
| <input type="checkbox"/> | Aff.Mail | | | x |
| <input type="checkbox"/> | Aff.Pub. | | | |
| <input type="checkbox"/> | Sp.Ntc. | | | |
| <input type="checkbox"/> | Pers.Serv. | | | |
| <input type="checkbox"/> | Conf. Screen | | | |
| <input checked="" type="checkbox"/> | Letters | 3/28/13 | | |
| <input type="checkbox"/> | Duties/Supp | | | |
| <input type="checkbox"/> | Objections | | | |
| <input type="checkbox"/> | Video Receipt | | | |
| <input type="checkbox"/> | CI Report | | | |
| <input type="checkbox"/> | 9202 | | | |
| <input type="checkbox"/> | Order | x | | |
| <input type="checkbox"/> | Aff. Posting | | | |
| <input type="checkbox"/> | Status Rpt | | | |
| <input type="checkbox"/> | UCCJEA | | | |
| <input type="checkbox"/> | Citation | | | |
| <input type="checkbox"/> | FTB Notice | | | |

| |
|-----------------------------|
| Reviewed by: skc |
| Reviewed on: 7/20/16 |
| Updates: |
| Recommendation: |
| File 2 – Pasley |

Page 2 – NEEDS/PROBLEMS/COMMENTS:

1. This petition does not provide any accounting in the form required by Probate Code §§ 2620, 1060, or any mandatory schedules on the required Judicial Council forms.

Need amended petition with accounting, schedules, including required mandatory form for summary. Although Petitioner has been appointed Guardian in Oklahoma, this Court retains jurisdiction for settling accounts pursuant to Probate Code §2630.

The only schedule provided at Exhibit B is a statement of property on hand, labeled as “receipts,” but which does not show any account summary, receipts, disbursements, etc., and further indicates that the conservatorship estate cash has been reduced by \$11,722.70 without explanation.

Note: The Conservatee’s interest in the Virginia real property is not an asset of this conservatorship estate, but should be referenced in its own schedule pursuant to §1063(h).

2. This petition is not verified by the Conservator as required by Probate Code §§ 1021, 1023.
(Note: §1023 provides that an attorney may sign or verify on a client’s behalf if he or she is absent from the county unless the person is a fiduciary appointing in the proceeding.)
3. Petitioner requests attorney’s compensation pursuant to Exhibit C, but no Exhibit C is attached.
4. Need Notice of Hearing.
5. Need proof of service of Notice of Hearing at least 15 days prior to the hearing pursuant to Probate Code §1460(b)(6) on:
 - Morgan Elizabeth Pasley (Conservatee)
 - Debra Pasley (Conservator/Fiduciary, since the petition is not verified by her)
 - David Hal Jones (Father)
6. *The Court may also require notice to the surety of any continued or future hearings.*

Probate Status Hearing RE: Transfer of Personal Property

| | | |
|--|---|--|
| DOD: 01/08/15 | BROOKE A. CASTLE , Granddaughter, was appointed Conservator of the Person and Estate on 8-15-13. | NEEDS/PROBLEMS/COMMENTS: |
| | | |
| | | |
| | | |
| Cont. from 011116, 031416, 042516 | Conservator's Second and Final Account was approved on 11/09/15. The Order Settling Second and Final Account authorized the conservator to transfer the balance of the property on hand, after payment of authorized fees, to Clayton James Stott, Successor Trustee of THE PATRICIA STOLL GREGORY STOLL SURVIVOR'S TRUST. An affidavit pursuant to Probate Code §§ 13100 – 13116 by Clayton James Stott was filed 10/19/15. | <u>Minute Order 4/25/16:</u> Counsel represent that a receipt is forthcoming and request 60 days. No appearance is necessary at the status hearing if the receipt is filed at least two court days prior. |
| Aff.Sub.Wit. | | As of 7/20/16, nothing further has been filed. |
| Verified | | |
| Inventory | | |
| PTC | | |
| Not.Cred. | | |
| Notice of Hrg | | |
| Aff.Mail | | |
| Aff.Pub. | | |
| Sp.Ntc. | | |
| Pers.Serv. | | |
| Conf. Screen | | |
| Letters | | |
| Duties/Supp | | |
| Objections | | |
| Video Receipt | | |
| CI Report | | |
| 9202 | | |
| Order | | |
| Aff. Posting | | |
| Status Rpt | | |
| UCCJEA | | |
| Citation | | |
| FTB Notice | | |
| | <p>Minute Order from 10/19/15 set this status hearing regarding transfer of personal property.</p> <p>Declaration of Summer A. Johnson filed 3/10/16 states the conservatee's personal property is presently located in a storage unit. Unfortunately, the trustee is unable to transfer the financial responsibility and take possession of the storage unit and items therein unless he appears in person at the storage unit. The trustee presently resides in the State of Washington. The Trustee has purchased airline tickets to travel to Fresno on March 22-24, 2016. Ms. Castle, the conservator, has indicated that she is not able to meet with the trustee that week because it coincides with Spring Break. Ms. Johnson has made a request of Ms. Castle's attorney, Mr. Shahbazian, that he or someone from his office provide access to the storage unit while the Trustee is in Fresno and she is awaiting confirmation from his office that someone will be able to meet with the trustee.</p> <p>Status Report filed 4/21/16 states Mr. Stott met with the conservator and other family members at the storage unit where the conservatee's personal property was being held.</p> <p style="text-align: center;">SEE PAGE 2.</p> | |
| | | Reviewed by: JF/skc |
| | | Reviewed on: 7/20/16 |
| | | Updates: |
| | | Recommendation: |
| | | File 3- Stott |

Page 2

Status Report filed 4/21/16 by Summer Johnson, attorney for Trustee Clayton James Stott, states Mr. Stott met with the conservator and other family members at the storage unit where the conservatee's personal property was being held. Other than the Conservatee's jewelry, it appears the majority of the personal property was held at the storage locker, with the exception of a German clock that couldn't be located, and several statues.

The parties present didn't have any information regarding the whereabouts of the German clock and it was theorized that Mrs. Stott's deceased son, Tim Stott, may have given it away during his lifetime. Additionally, it was reported that the statues were apparently broken during the conservatee's lifetime and disposed of.

Later that day, a meeting was held at the offices of Dowling Aaron Incorporated between Mr. Stott, the Conservator, some beneficiaries of the trust, and related family members, at which meeting the Conservator delivered the jewelry. As a result, some personal property items have been able to be delivered to their intended recipients pursuant to the trust.

Ms. Johnson requested that Mr. Shahbazian propose a receipt for Mr. Stott to execute in order for his client to be discharged as conservator. Additionally, she requested that the Conservator provide an informal accounting of any funds which were to be distributed from the conservatorship to Mr. Stott as trustee to the extent that funds had been utilized by the conservator since the end of the account period. Cash on hand at the end of the account period 6/22/15 was \$2,928.46.

The informal account was requested due to the fact that the storage unit was held in the name of the conservator's mother, and not in the name of the conservatorship, and was also storing a significant amount of items belonging to the conservator's deceased father, Tim Stott.

Ms. Johnson states she is awaiting the receipt and the informal accounting from Mr. Shahbazian.

Probate Status Hearing RE: Filing of the First and Final Account

| | | |
|---|---|---|
| DOD: 6/18/14 | ALESHA J. JENSEN , Daughter, was appointed Administrator with Full IAEA without bond on 12/9/14. Letters issued on 12/10/14. | NEEDS/PROBLEMS/COMMENTS: 1. Need first account or petition for final distribution or current written status report per Local Rule 7.5. |
| Cont. from 020916, 051016 | At the hearing on 12/9/14, the Court set this status hearing for the filing of the first account or petition for final distribution. | |
| <input type="checkbox"/> Aff.Sub.Wit. | <p>Status Report filed on 2/8/16 states Alesha J. Jensen is preparing to file a petition for final distribution of the entire estate. However, more than 75% of the value of the decedent's estate is comprised of vehicles, tractors, farm equipment, trailers, guns, tools other miscellaneous equipment that is not easily distributable in undivided interests. The heirs would like for certain of such items to be distributed in kind to identified heirs. Also, one of the heirs desires to purchase the estate's interest in certain other vehicles, tractors, farm equipment, trailers, guns etc. and expects to obtain financing to complete the intended purchases. Alesha J. Jensen requests a continuance of 90 days to give the prospective purchasing heir time to obtain the necessary financing.</p> <p>Status Report filed 5/9/16 states the prospective purchasing heir remains in the process of arranging for appropriate financing to purchase the estate's interest in certain assets. Therefore, the personal representative requests continuance of the instant status hearing for a period of 60 days to give the heir time to obtain financing and for the sale to be completed after giving notice of proposed sale to interested parties.</p> | |
| <input checked="" type="checkbox"/> Verified | | |
| <input type="checkbox"/> Inventory | | |
| <input type="checkbox"/> PTC | | |
| <input type="checkbox"/> Not.Cred. | | |
| <input type="checkbox"/> Notice of Hrg | | |
| <input type="checkbox"/> Aff.Mail | | |
| <input type="checkbox"/> Aff.Pub. | | |
| <input type="checkbox"/> Sp.Ntc. | | |
| <input type="checkbox"/> Pers.Serv. | | |
| <input type="checkbox"/> Conf. Screen | | |
| <input type="checkbox"/> Letters | | |
| <input type="checkbox"/> Duties/Supp | | |
| <input type="checkbox"/> Objections | | |
| <input type="checkbox"/> Video Receipt | | |
| <input type="checkbox"/> CI Report | | |
| <input type="checkbox"/> 9202 | | |
| <input type="checkbox"/> Order | | |
| <input type="checkbox"/> Aff. Posting | | |
| <input checked="" type="checkbox"/> Status Rpt | | |
| <input type="checkbox"/> UCCJEA | | |
| <input type="checkbox"/> Citation | | |
| <input type="checkbox"/> FTB Notice | | |
| | | Reviewed by: skc |
| | | Reviewed on: 7/20/16 |
| | | Updates: \ |
| | | Recommendation: |
| | | File 6- Bergen |

First and Final Account and Report of Conservator; Petition for Allowance of Compensation to Conservator and His Attorney; Termination of Conservatorship of the Estate; and Distribution.

| | | | |
|-------------------------------------|----------------------|---|--|
| | | PUBLIC GUARDIAN , Conservator, is petitioner. | NEEDS/PROBLEMS/COMMENTS: 1. Need proof of service on conservatee, Barbara Skopec. 2. Order includes a statement for distribution to include "any other property of the deceased conservatee not now known or discovered." The conservatee is not deceased. In addition, a conservatorship cannot distribute property that has not been included in the conservatorship. – Examiner has crossed out that portion of the order. |
| | | Account period: 1/15/15 – 5/31/16 | |
| Cont. from | | Accounting - \$4,875.49 | |
| <input type="checkbox"/> | Aff.Sub.Wit. | Beginning POH - \$4,875.49 | |
| <input checked="" type="checkbox"/> | Verified | Ending POH - \$4,471.39 | |
| <input type="checkbox"/> | Inventory | Conservator - \$1,064.76 | |
| <input type="checkbox"/> | PTC | (9.31 Deputy hours @ \$96/hr and 2.25 Staff hours @ \$76/hr) | |
| <input type="checkbox"/> | Not.Cred. | Attorney - \$600.00 (less than allowed per Local Rule) | |
| <input checked="" type="checkbox"/> | Notice of Hrg | Court fees - \$52.00 (certified copies) | |
| <input checked="" type="checkbox"/> | Aff.Mail | Petitioner states the purpose of the conservatorship was to allow the Public Guardian to marshal an IRA from the father's estate. All other assets are held in trust. The IRA was marshaled, and the cash is ready for distribution to the Trustee. Since the purpose of the conservatorship was accomplished, it is no longer needed, and petitioner requests that the conservatorship of the estate be terminated. | |
| <input type="checkbox"/> | Aff.Pub. | Petitioner prays for an Order: | |
| <input type="checkbox"/> | Sp.Ntc. | 1. Approving, allowing and settling the first and final account; | |
| <input type="checkbox"/> | Pers.Serv. | 2. Authorizing the conservator and attorney fees and commissions; | |
| <input type="checkbox"/> | Conf. Screen | 3. Payment of the court fees; | |
| <input type="checkbox"/> | Letters | 4. Authorize petitioner to distribute the remaining estate of \$2,319.63 to Lisa Lepper, trustee of the Conservatee's trust. | |
| <input type="checkbox"/> | Duties/Supp | | |
| <input type="checkbox"/> | Objections | | |
| <input type="checkbox"/> | Video Receipt | | |
| <input type="checkbox"/> | CI Report | | |
| <input type="checkbox"/> | 9202 | | |
| <input checked="" type="checkbox"/> | Order | | |
| <input type="checkbox"/> | Aff. Posting | | |
| <input type="checkbox"/> | Status Rpt | | |
| <input type="checkbox"/> | UCCJEA | | |
| <input type="checkbox"/> | Citation | | |
| <input type="checkbox"/> | FTB Notice | | |

Reviewed by: KT

Reviewed on: 7/20/16

Updates:

Recommendation:

File 7- Skopec

Probate Status Hearing RE: First or Final Account

| | | |
|--------------------------|--|---|
| DOD: 5/26/14 | BERTHA SOLTERO , Spouse, was appointed Executor with Full IAEA without bond on 2/10/15. Letters issued 2/20/15. | NEEDS/PROBLEMS/COMMENTS: 1. Need first account or petition for final distribution pursuant to Probate Code §12200. |
| | | |
| Cont. from 041216 | At the hearing on 2/10/15, the Court set this status hearing for the filing of the first account or petition for final distribution. | |
| Aff.Sub.Wit. | | |
| Verified | | |
| Inventory | | |
| PTC | | |
| Not.Cred. | | |
| Notice of Hrg | Status Report filed 4/4/16 by Attorney Hiyama states the estate assets consist of four real properties. Two have been sold and another is being held to be distributed among the beneficiaries. The last remaining property is in the process of being sold. After Notice of Proposed Action has been filed and the time period for objections has passed, the first and final account and petition for final distribution will be prepared. Mr. Hiyama requests the Court continue this status hearing for approx. 90 days to allow escrow to close on the sale and prepare a petition for final distribution. | |
| Aff.Mail | | |
| Aff.Pub. | | |
| Sp.Ntc. | | |
| Pers.Serv. | | |
| Conf. Screen | | |
| Letters | | |
| Duties/Supp | | |
| Objections | | |
| Video Receipt | Status Report filed 7/14/16 states the last remaining property is currently in the process of being sold. Escrow has yet to close because the title company has not received the payoff amount from the mortgage lender holding the current loan on the subject property. Mr. Hiyama requests an additional 90 days. | |
| CI Report | | |
| 9202 | | |
| Order | | |
| Aff. Posting | | Reviewed by: skc |
| Status Rpt | | Reviewed on: 7/20/16 |
| UCCJEA | | Updates: |
| Citation | | Recommendation: |
| FTB Notice | | File 9- Soltero |

**First Account Current and Report of Conservator and Petition for Allowance
of Compensation to Conservator and Attorney and for Dispensation of
Further Accounts**

| | | | |
|-------------------------------------|----------------------|--|---------------------------------|
| | | PUBLIC GUARDIAN , Conservator, is petitioner. | NEEDS/PROBLEMS/COMMENTS: |
| | | Account period: 2/11/15 – 5/31/16 | |
| | | Accounting - \$322,775.36 | |
| | | Beginning POH - \$247,081.81 | |
| | | Ending POH - \$ 11,455.98 | |
| Cont. from | | Conservator - \$3,850.16 | |
| <input type="checkbox"/> | Aff.Sub.Wit. | (31.73 Deputy hours @ \$96/hr and 10.58 Staff hours @ \$76/hr) | |
| <input checked="" type="checkbox"/> | Verified | Attorney - \$2,500.00 (per Local Rule) | |
| <input type="checkbox"/> | Inventory | Bond fee - \$144.64 (o.k.) | |
| <input type="checkbox"/> | PTC | Court fees - \$617.00 (filing fees and certified copies) | |
| <input type="checkbox"/> | Not.Cred. | Petitioner states that the conservatorship estates meets the requirements of Probate Code § 2628(b) to dispenses with further accountings. Petitioner requests that the court dispense with further accountings as long as conservatorship estate continues the requirements of Probate Code §2628(b). | |
| <input checked="" type="checkbox"/> | Notice of Hrg | Petitioner prays for an Order: | |
| <input checked="" type="checkbox"/> | Aff.Mail W/ | 5. Approving, allowing and settling the first account; | |
| <input type="checkbox"/> | Aff.Pub. | 6. Authorizing the conservator and attorney fees and commissions; | |
| <input type="checkbox"/> | Sp.Ntc. | 7. Payment of the bond fee; | |
| <input type="checkbox"/> | Pers.Serv. | 8. Dispensing with further accountings. | |
| <input type="checkbox"/> | Conf. Screen | | |
| <input type="checkbox"/> | Letters | | |
| <input type="checkbox"/> | Duties/Supp | | |
| <input type="checkbox"/> | Objections | | |
| <input type="checkbox"/> | Video Receipt | | |
| <input type="checkbox"/> | CI Report | | |
| <input type="checkbox"/> | 9202 | | |
| <input checked="" type="checkbox"/> | Order | | |
| <input type="checkbox"/> | Aff. Posting | | |
| <input type="checkbox"/> | Status Rpt | | |
| <input type="checkbox"/> | UCCJEA | | |
| <input type="checkbox"/> | Citation | | |
| <input type="checkbox"/> | FTB Notice | | |
| | | | Reviewed by: KT |
| | | | Reviewed on: 7/20/16 |
| | | | Updates: |
| | | | Recommendation: |
| | | | File 10- Beatty |

First Amended First and Final Account and Report of Status of Administration of Administrator and Petition for Settlement Thereof; for Allowance of Statutory Attorney's Fees and Administrator's Compensation; for Extraordinary Attorney's Fees; for Costs Reimbursement and for Final Distribution.

| | | | | | | | | |
|-------------------------------------|----------------------|--------------------------|--|--|--|---|--|--|
| DOD: 6/18/15 | | | KENNITH E. HORN , Administrator, is petitioner. | | | NEEDS/PROBLEMS/COMMENTS: | | |
| | | | Account period: 12/1/15 – 5/11/16 | | | 1. Statutory fees are calculated incorrectly. The fee base failed to include the losses of \$1,950.00. The correct statutory fee is \$3,147.22. 2. Petition does not contain a statement stating that notice to the Franchise Tax Board was performed, as required by Probate Code 9202(c)(1). | | |
| | | | Accounting - \$80,630.31 | | | | | |
| | | | Beginning POH - \$80,300.00 | | | | | |
| | | | Ending POH - \$76,777.81 | | | | | |
| Cont. from | | | Administrator - \$3,225.00 (greater than statutory) | | | | | |
| <input type="checkbox"/> | Aff.Sub.Wit. | <input type="checkbox"/> | Attorney - \$3,225.00 (greater than statutory) | | | | | |
| <input checked="" type="checkbox"/> | Verified | <input type="checkbox"/> | Attorney X/O - \$5,637.50 (per itemization for 20.50 hours @ \$275/hr for sale of real property without a broker) | | | | | |
| <input checked="" type="checkbox"/> | Inventory | <input type="checkbox"/> | Costs - \$2,470.10 (filing fees, publication, probate referee, certified copies) | | | | | |
| <input checked="" type="checkbox"/> | PTC | <input type="checkbox"/> | Closing - \$1,131.74 | | | | | |
| <input checked="" type="checkbox"/> | Not.Cred. | <input type="checkbox"/> | Creditors - \$8,288.47 | | | | | |
| <input checked="" type="checkbox"/> | Notice of Hrg | <input type="checkbox"/> | Distribution pursuant to intestate succession and assignments of interest is to: | | | | | |
| <input checked="" type="checkbox"/> | Aff.Mail | <input type="checkbox"/> | Katharine Dennis - \$10,560.00 | | | | | |
| <input type="checkbox"/> | Aff.Pub. | <input type="checkbox"/> | Carol Zimmerman - \$10,560.00 | | | | | |
| <input type="checkbox"/> | Sp.Ntc. | <input type="checkbox"/> | David Horn - \$7,060.00 | | | | | |
| <input type="checkbox"/> | Pers.Serv. | <input type="checkbox"/> | Kennith Horn - \$3,560.00 | | | | | |
| <input type="checkbox"/> | Conf. Screen | <input type="checkbox"/> | April Guevara - \$3,520.00 | | | | | |
| <input checked="" type="checkbox"/> | Letters | 11/4/15 | Michelle Horn - \$3,520.00 | | | | | |
| <input type="checkbox"/> | Duties/Supp | <input type="checkbox"/> | Shawn McGill - \$3,520.00 | | | | | |
| <input type="checkbox"/> | Objections | <input type="checkbox"/> | Approved Inheritance Cash - \$10,500.00 | | | | | |
| <input type="checkbox"/> | Video Receipt | <input type="checkbox"/> | | | | | | |
| <input type="checkbox"/> | CI Report | <input type="checkbox"/> | | | | | | |
| <input checked="" type="checkbox"/> | 9202 | <input type="checkbox"/> | | | | | | |
| <input checked="" type="checkbox"/> | Order | <input type="checkbox"/> | | | | | | |
| <input type="checkbox"/> | Aff. Posting | <input type="checkbox"/> | | | | | | |
| <input type="checkbox"/> | Status Rpt | <input type="checkbox"/> | | | | | | |
| <input type="checkbox"/> | UCCJEA | <input type="checkbox"/> | | | | | | |
| <input type="checkbox"/> | Citation | <input type="checkbox"/> | | | | | | |
| <input type="checkbox"/> | FTB Notice | X | | | | | | |
| | | | | | | Reviewed by: KT | | |
| | | | | | | Reviewed on: 7/20/16 | | |
| | | | | | | Updates: | | |
| | | | | | | Recommendation: | | |
| | | | | | | File 13- Clark | | |

16 Christopher Harshaw, Jr., and Ciara Harshaw (GUARD/P)

Case No. 16CEPR00191

Petitioner Harshaw, Anna Marie (Pro Per – Paternal Aunt – Petitioner)

Petition for Appointment of Guardian of the Person

| | | | |
|-------------------------------------|---------------|-------------------------------------|---|
| See petition for details. | | | NEEDS/PROBLEMS/ COMMENTS: |
| | | | |
| | | | <u>Minute Order 6/14/16:</u> Anna Harshaw was handed objection in open court by the deputy. Any responses need to be filed by 7/12/16. |
| | | | |
| Cont. from 042616, 061416 | | | <u>Note:</u> Response was filed 6/30/16. |
| <input type="checkbox"/> | Aff.Sub.Wit. | <input type="checkbox"/> | |
| <input checked="" type="checkbox"/> | Verified | <input type="checkbox"/> | |
| <input type="checkbox"/> | Inventory | <input type="checkbox"/> | |
| <input type="checkbox"/> | PTC | <input type="checkbox"/> | |
| <input type="checkbox"/> | Not.Cred. | <input type="checkbox"/> | |
| <input type="checkbox"/> | Notice of Hrg | <input checked="" type="checkbox"/> | |
| <input type="checkbox"/> | Aff.Mail | <input checked="" type="checkbox"/> | |
| <input type="checkbox"/> | Aff.Pub. | <input type="checkbox"/> | |
| <input type="checkbox"/> | Sp.Ntc. | <input type="checkbox"/> | |
| <input type="checkbox"/> | Pers.Serv. | <input checked="" type="checkbox"/> | |
| <input checked="" type="checkbox"/> | Conf. Screen | <input type="checkbox"/> | |
| <input checked="" type="checkbox"/> | Letters | <input type="checkbox"/> | |
| <input checked="" type="checkbox"/> | Duties/Supp | <input type="checkbox"/> | |
| <input checked="" type="checkbox"/> | Objections | <input type="checkbox"/> | |
| <input type="checkbox"/> | Video Receipt | <input type="checkbox"/> | |
| <input checked="" type="checkbox"/> | CI Report | <input type="checkbox"/> | |
| <input checked="" type="checkbox"/> | Clearances | <input type="checkbox"/> | |
| <input checked="" type="checkbox"/> | Order | <input type="checkbox"/> | |
| <input type="checkbox"/> | Aff. Posting | <input type="checkbox"/> | |
| <input type="checkbox"/> | Status Rpt | <input type="checkbox"/> | |
| <input checked="" type="checkbox"/> | UCCJEA | <input type="checkbox"/> | |
| <input type="checkbox"/> | Citation | <input type="checkbox"/> | |
| <input type="checkbox"/> | FTB Notice | <input type="checkbox"/> | |
| | | | Reviewed by: skc |
| | | | Reviewed on: 7/20/16 |
| | | | Updates: |
| | | | Recommendation: |
| | | | File 16- Harshaw |

Petitioner Hernandez, David (Pro Per Petitioner)
 Petitioner Hernandez, Arminda (Pro Per Petitioner)

Petition for Appointment of Guardian of the Person

| | | | |
|---------------------------|---------------|---|---|
| See petition for details. | | | NEEDS/PROBLEMS/COMMENTS: |
| | | | Minute Order 6/14/16: The Court Investigator is to follow upon the reports from CPS. |
| | | | Note: A supplemental report was filed 7/15/16. |
| | | | As of 7/20/16, the following issue remains noted: |
| | | | 1. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on the unknown father and paternal grandparents. |
| Cont. from 061416 | | | |
| | Aff.Sub.Wit. | | |
| ✓ | Verified | | |
| | Inventory | | |
| | PTC | | |
| | Not.Cred. | | |
| ✓ | Notice of Hrg | | |
| ✓ | Aff.Mail | W | |
| | Aff.Pub. | | |
| | Sp.Ntc. | | |
| ✓ | Pers.Serv. | | |
| ✓ | Conf. Screen | | |
| ✓ | Letters | | |
| ✓ | Duties/Supp | | |
| | Objections | | |
| | Video Receipt | | |
| ✓ | CI Report | | |
| ✓ | Clearances | | |
| ✓ | Order | | |
| | Aff. Posting | | |
| | Status Rpt | | |
| ✓ | UCCJEA | | |
| | Citation | | |
| | FTB Notice | | |
| | | | Reviewed by: skc |
| | | | Reviewed on: 7/20/16 |
| | | | Updates: |
| | | | Recommendation: |
| | | | File 18- Ruiz |

Petition for Probate of Will and for Letters Testamentary. Authorization to Administer under the Independent Administration of Estates Act

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|--|----------------------|--|---|---|
| DOD: 3/5/16 | | <p>JOYCE ROSENWALD, named executor without bond, is Petitioner.</p> <p>Petitioner is a resident of Corvallis, OR.</p> <p>Full IAEA – ok</p> <p>Will dated 5/19/07</p> <p>Residence: Fresno Publication: Business Journal</p> <p>Estimated value of estate: Personal property: \$ 10,000.00 Real property: \$126,853.00 Total: \$136,853.00</p> <p>Probate Referee: Rick Smith</p> | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order 6/21/16: Counsel informed the court that the value may increase; that's why probate has been chosen (over summary administration).</p> <p>The following issue remains noted:</p> <p>1. Petitioner is a resident of Corvallis, OR; therefore, bond of \$136,853.00 may be required pursuant to Probate Code §8571 and CRC 7.201(b).</p> <p>Note: Petitioner is reminded of her duty to apply for increased bond if necessary. CRC 7.204.</p> <p>Note: If granted, the court will set status hearings as follows:</p> <ul style="list-style-type: none"> Tuesday, August 30, 2016 for filing of bond (\$136,853.00); Tuesday, January 3, 2017 for filing Inventory and Appraisal; Tuesday, October 24, 2017 for filing the first account or petition for final distribution. | |
| | | | | |
| | | | | |
| Cont. from 062116 | | | | |
| ✓ | Aff.Sub.Wit. | | | |
| ✓ | Verified | | | |
| | Inventory | | | |
| | PTC | | | |
| | Not.Cred. | | | |
| ✓ | Notice of Hrg | | | |
| ✓ | Aff.Mail | | | w |
| ✓ | Aff.Pub. | | | |
| | Sp.Ntc. | | | |
| | Pers.Serv. | | | |
| | Conf. Screen | | | |
| ✓ | Letters | | | |
| ✓ | Duties/Supp | | | |
| | Objections | | | |
| | Video Receipt | | | |
| | CI Report | | | |
| | 9202 | | | |
| ✓ | Order | | | |
| | Aff. Posting | | | |
| | Status Rpt | | | |
| | UCCJEA | | | |
| | Citation | | | |
| | FTB Notice | | | |
| <p>Reviewed by: skc</p> <p>Reviewed on: 7/20/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 19- Nelson</p> | | | | |

**20 Clarke Gillis, Veronica Black, Victoria Gillis, Christian Gillis, Joseph Gillis
(GUARD/P) Case No. 16CEPR00556**

Petitioner Black, Tod (Pro Per – Maternal Grandfather – Petitioner)
 Petitioner Black, Virginia (Pro Per – Maternal Grandmother – Petitioner)
 Petition for Appointment of Guardian of the Person

| | | | |
|---|---------------|--|---|
| Veronica Black, 15 | | <u>TEMPORARY DENIED ON 06/09/2016</u> TOD BLACK and VIRGINIA BLACK , Maternal Grandparents, are Petitioners. <u>Please see file for details</u> | NEEDS/PROBLEMS/COMMENTS: 1. Need proof of personal service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> • Father of Veronica (Unknown) • Clarke Gillis (Father of Clarke, Victoria, Christian, and Joseph) 2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> • Paternal Grandparents of Veronica (Unknown) • Paternal Grandparents of Clarke, Victoria, Christian, and Joseph (Unknown) |
| Clarke Gillis, 14 | | | |
| Victoria Gillis, 11 | | | |
| Christian Gillis, 10 | | | |
| Joseph Gillis, 9 | | | |
| | Aff.Sub.Wit. | | |
| ✓ | Verified | | |
| | Inventory | | |
| | PTC | | |
| | Not.Cred. | | |
| ✓ | Notice of Hrg | | |
| | Aff.Mail | x | |
| | Aff.Pub. | | |
| | Sp.Ntc. | | |
| | Pers.Serv. | x | |
| ✓ | Conf. Screen | | |
| ✓ | Letters | | |
| ✓ | Duties/Supp | | |
| | Objections | | |
| | Video Receipt | | |
| ✓ | CI Report | | |
| | 9202 | | |
| ✓ | Order | | |
| | Aff. Posting | | |
| | Status Rpt | | |
| ✓ | UCCJEA | | |
| | Citation | | |
| | FTB Notice | | |
| Court Investigator Dina Calvillo to provide: <ol style="list-style-type: none"> 1) CI Report 2) Clearances | | | |
| Reviewed by: LV | | | |
| Reviewed on: 07/20/2016 | | | |
| Updates: | | | |
| Recommendation: | | | |
| File 20- Gillis/ Black | | | |

Petitioner Juarez, Carmen (Pro Per – Mother – Petitioner)

Petitioner Juarez, Gilbert (Pro Per – Father – Petitioner)

Petition for Appointment of Temporary Conservator of the Person and Estate

| | | | |
|---------------------------|---------------|---|---|
| See petition for details. | | | NEEDS/PROBLEMS/COMMENTS: |
| | | | <u>Court Investigator Dina Calvillo to advise rights, file report.</u> |
| | | | <u>Note:</u> This petition was originally set for hearing on 8/1/16; however, upon review, the Court moved the hearing date to 7/26/16. Notice of the hearing date change was mailed to Petitioners on 7/19/16. |
| | Aff.Sub.Wit. | | 1. The petition is not signed/verified by Petitioner Carmen Juarez. |
| ✓ | Verified | x | 2. Need Confidential Conservator Screening Form for Petitioner Carmen Juarez. |
| | Inventory | | 3. Need Notice of Hearing. |
| | PTC | | 4. Need proof of personal service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing per Probate Code §2250(e) on Norma Jean Juarez (Proposed Conservatee). |
| | Not.Cred. | | 5. The Court may require clarification regarding the source of Ms. Juarez' income. Pursuant to Local Rule 7.15.4, if the only asset or income is public assistance benefits, conservatorship of the estate is not required. |
| | Notice of Hrg | x | 6. Petitioners list themselves as the only relatives within the second degree. List should include parents, grandparents, siblings, children, grandchildren, if any. The Court may require clarification. |
| | Aff.Mail | x | |
| | Aff.Pub. | | |
| | Sp.Ntc. | | |
| | Pers.Serv. | x | |
| ✓ | Conf. Screen | x | |
| ✓ | Letters | | |
| ✓ | Duties/Supp | | |
| | Objections | | |
| | Video Receipt | | |
| | CI Report | x | |
| | 9202 | | |
| | Order | | |
| | Aff. Posting | | Reviewed by: skc |
| | Status Rpt | | Reviewed on: 7/20/16 |
| | UCCJEA | | Updates: |
| | Citation | | Recommendation: |
| | FTB Notice | | File 22- Juarez |